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MARKET PROSPECTS for U.S. HORTICULTURAL PRODUCTS in JAPAN

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FOREWORD

The survey on which this report is based was conducted to determine the potential for greater sales of U.S.-grown horticultural crops and products in Japan. The need for the survey was accentuated because of the improved transportation facilities (container ships and air-cargo planes) scheduled for operation in late 1969 and early 1970. These facilities could be a factor in increasing U.S. exports of horticultural products to Japan. At present, these exports are relatively small, valued at about $30 million.

The survey was conducted by a two-man team and covered the major Japanese markets—Tokyo, Osaka, Yokohama, and Kobe. Interviews were carried out with government officials, representatives of importing or trading companies, wholesalers, retailers, institutional feeders, frozen-food packers, transportation company officials, and department store representatives.

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MARKET PROSPECTS FOR U.S. HORTICULTURAL PRODUCTS IN JAPAN

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INTRODUCTION

Japan is a large importer of food and the No. 1 export market for U.S. agricultural commodities. Total U.S. agricultural exports to Japan have been around $900 million per year. However, fruits and vegetables have accounted for only a small part of these exports, less than $30 million per year; and lemons and raisins have accounted for about 70 percent of the total fruit and vegetable imports from the United States.

The bulk of Japan's imports of fruits and vegetables are from nearby areas. Taiwan, the Philippines, and the Ryukyu Islands are the chief suppliers. Competition for the Japanese market is also keen from other areas such as Australia, New Zealand, Korea, and Communist China.

In addition, Japan produces much of its own requirements. The country is largely self-sufficient in vegetables, and its self-supply rate is around 90 to 97 percent for fruits. Apples, oranges, persimmons, and pears are plentiful. Head lettuce, pascal celery, Irish potatoes, and sweet corn are also being produced, as are traditional Japanese vegetables like radishes, cucumbers, cabbage, celery, and leeks.

Rice has long been the staple food of Japan. Its production has been encouraged by a high support price. Cultural practices and technological advances have resulted in higher yields with a large reduction in labor inputs.

Coupled with the increases in production are the changing Japanese food habits. As their economy has been developing, consumers have begun to switch from their basic rice diet to increased intakes of protein, dairy products, fruits, and vegetables.

The Japanese Government has been urging farmers to reduce rice acreage and plant other crops. However, with the high support price for rice, farmers have few alternatives which will give them as high a return as rice on their small acreages. The average rice grower finds his best farm management program is to work in a factory through the winter and quit in time to get his rice crop planted in the spring.

The shifts to other crops have been slow, but a trend in this direction can be expected. Vegetables will be among the more attractive alternative crops. While returns may not be so high as for citrus or rice (under the present high support price), they should be more profitable than other small grains. While vegetables are produced in Japan year-round and the country is largely self-sufficient, there are periods of the year when supplies of certain vegetables may be short and prices are high, as in the United States.

There is considerable hothouse production also in Japan. As rice acreage decreases, this type of production is expected to increase. Much of the hothouse production to date has concentrated on grapes and melons, but as acreage expands more will be utilized for vegetable production. The Japanese Government in its long-range forecasts expects vegetable production to be adequate for the country's requirements.

Fruit production in Japan presents a different situation. Orange production is growing, and this trend is expected to continue, particularly with the Satsuma (Mikan) variety. Apples and pears are probably at their peak, and production is expected to remain stable. Grower's profits from deciduous fruits are not as large per hectare as from citrus, and because deciduous production is closer to requirements, returns are subject to wider price fluctuations. Japanese consumers prefer oranges to apples; since the seasons coincide, competition from oranges affects the apple market to a greater extent than the apple supply situation.

Orange production is growing at a sharp rate in Japan. Satsumas account for about 90 percent of Japanese orange production. The remaining production is in summer oranges, navels, and about 10 miscellaneous varieties and kinds of citrus.

The Satsuma is to fruit production in Japan what rice is to the remainder of Japanese agriculture. The price and supply of oranges affect the returns for deciduous fruits more than the size of the deciduous crops. The demand for citrus in Japan has continued to expand, and the area devoted to Satsumas has been increasing steadily in recent years. The annual rate of growth has been about 10 percent because of the strong demand and more favorable returns to growers in relation to other fruit crops. The trend toward new plantings is clearly reflected in the acreage planted to Satsumas. Of the 155,000 hectares (1 hectare = 2.471 acres) in Satsumas, 70,000 or 45 percent are young nonbearing trees. Satsumas, both fresh and canned, are an export item for Japan. They can be imported into five U.S. States (Washington, Oregon, Idaho, Montana, and Alaska) in fresh form, and the United States is the leading market for canned oranges, taking about 40 percent of Japanese exports.

Methods of selling produce in Japan are not comparable or compatible with those of the produce industry in the United States. Lemons have been the exception. In Japan, produce is sold at auction in the large wholesale markets each morning. Producers or their marketing organizations consign their produce to middlemen and "trade participants." The wholesaler receives a commission set by the government. In Tokyo the commission for fruit is 7 percent of the selling price and for vegetables, 8½ percent. U.S. fruit and vegetable shippers cannot risk selling on consignment with the distance and time involved. Unless f.a.s. or f.o.b. deals are made, the U.S. exporter could suffer heavy financial losses. On the other hand, if the Japanese importing company buys on an agreed stateside price, it runs the risk of returns being below its buying price in the United States.

TRADE BARRIERS

Trade barriers, both tariff and nontariff, are some of the largest stumbling blocks to increased trade with Japan. Many commodities, tubers and deciduous fruits, for example, are completely embargoed because of plant quarantine restrictions. Others are subject to restrictive quotas, which are usually announced every 6 months. Citrus (other than lemons and limes) is one good example of the latter

Many processed foods also are subject to quotas. Canning and freezing are not big industries in Japan, but quotas and trade barriers do exist on most processed tomato products, pineapple, fruit juices, and products derived from fruit juices. Efforts to liberalize commodities are being carried on continually; but the Japanese Government has been reluctant to move in the direction of freer trade.

Imports of fresh citrus currently are small and come entirely from the United States since imports from most citrus-producing areas are restricted by plant quarantine requirements. For Japanese fiscal year 1968-69 (April 1968-March 1969) the quota for grapefruit and oranges was 3,500 tons. An agreement on plant-quarantine requirements for Hawaiian papayas has recently been worked out, which will permit imports for a 4-month period. Hawaii, however, must meet certain fumigation procedures under the supervision of a Japanese

inspector brought to Hawaii at Hawaiian expense. U.S. high-moisture prunes are largely prohibited from Japan because use of sorbate is prohibited on prunes. Even though the Japanese use sorbate, principally on fish, and Japan is the leading sorbic acid producer and exporter, imported products are controlled. Such restrictions, as shown in the above examples, are the types of barriers which U.S. exporters must cope with when trying to sell in the Japanese market.

The U.S. Government is continually trying to obtain liberalized concessions from the Japanese, but this is a slow process. The last major liberalization for fruits and vegetables was granted in May 1964 for lemons. (Limes were liberalized in October 1968, but they are not of major importance to U.S. growers as an exportable commodity.) This has resulted in a $10 million export market for the United States and reasonably priced lemons for the Japanese. Raisins were liberalized in 1961, and Japan is now the leading export market for U.S. raisins. Commodities that are not produced in Japan could be exported if such barriers or quotas did not exist. Grapefruit offers the most promise. It is well liked by the Japanese, but it is very expensive because of the low quota. Washington navel oranges are another commodity acceptable to Japanese taste. While the U.S.-grown navel does not resemble the local Satsuma oranges, it is doubtful the Japanese will liberalize oranges because of the large local production. Many U.S. deciduous fruits likewise differ from the types grown in Japan, but export possibilities are nullified by the quarantine restrictions.

Imports of citrus juices are also under the quota system and are generally allocated to hotels and restaurants. The Japanese Government is gradually increasing the quota, but the total quantity allowed to enter is still small. Most of the juices imported are from the United States although South Africa and Australia occasionally export juices to Japan. Prospects to liberalize citrus juice imports are not encouraging because of the increasing production of Satsumas.

Tariffs are not in themselves excessive and do not have the trade-restricting effects of the nontariff barriers, embargoes, and quotas. The following table summarizes the tariffs levied on fruits and vegetables:

Standard Import Duties

Fruit:	
Oranges	20 percent seasonal rate . . 40 percent (Dec.-May)
Grapefruit	20 percent
Lemons	10 percent
Others:	
Preserved	20-45 percent
Dried	5-20 percent
Vegetables:	
Fresh	8-10 percent
Frozen	10 percent
Dried	15 percent
Nuts	13-30 percent (bitter almonds, duty free)

TRANSPORTATION AND HANDLING

The principal reason for conducting this survey was because of the improvements expected in facilities for transportation from the United States to Japan. A major Japanese airline is aggressively soliciting business between the two countries. The U.S. flag carriers now in the U.S.-Japanese trade have been active in the airfreight business, but have not been able to expand to the Far East because of military commitments.

In addition to airfreight, containerized shipping has been receiving substantial publicity. The Japanese have recently inaugurated container service between the U.S. Pacific coast and Japan. An American shipping line was the pioneer with containers in the Pacific, but primarily between Hawaii and the U.S. mainland. This line has large, fast ships now under construction in the United States and in Germany, but the first of these is not expected to be in service until late 1969 or early 1970. Half of these new ships will be used in the U.S.-Japan run and the others in the Hawaii-mainland run. Other companies are also expanding container service to Japan.

The impact of the container ships may not be known for sometime. Most companies are planning to operate only a few ships on the U.S.-Japan run unless business necessitates an increase in service and additional ships are available. Crossings take about 14 days with the vessels now in service, and the new ships are expected to make the crossing in 9 days. The gain of 5 days, however, will be largely nullified unless present methods of handling the containers upon arrival are improved. It takes 2-3 days for a container to be unloaded from the ship and to clear customs. The highway system in Japan is not developed to the extent that fast freight is a reality after the container has been cleared. Surface freight from the two main ports in Japan—Kobe and Yokohama—is slow because of equipment and congestion. In addition, refrigeration and food handling facilities are not developed for keeping commodities for any length of time once the container is opened.

The time saved when the new ships become operative will become an asset if arrival conditions can be improved by rapid customs clearance, refrigeration, and quick movement from ports to distribution centers and retail outlets. Controlled-atmosphere treatments may also be beneficial for some commodities if arrangements can be made to leave the container closed until final unloading.

The military has been using containers for sometime. Their experiences with perishables indicate the risks on commercial shipments under present conditions. Damage ranges from 10 to 90 percent with 25 to 50 percent the common range.

The Japanese are flying some commodities between the United States and Japan but only in small quantities limited to luxury items. Avocados and fresh pineapples are two such examples. The retail selling price for each averages around $1.50. The airfreight rate on these items is 30 cents a pound. U.S. carriers advise that they can match this rate if the volume justifies the business.

PROSPECTS FOR FRESH FRUITS AND VEGETABLES

Citrus

The market potential for grapefruit is the most promising among U.S. commodities if this fruit is liberalized by the Japanese. Grapefruit is now in the luxury or gift category. It sells at retail for 60-80 cents per fruit because of the low quota. The same situation once existed for lemons, which now retail for one-fourth to one-third of prices prior to liberalization.

Most Japanese know grapefruit. They like it and would buy it in quantity if it were available at reasonable prices. The chief reason given for reluctance to liberalize is the effect imports would have on the Japanese summer orange, which resembles a grapefruit in color, but not in flavor or use. Pressures by the United States for liberalization continue, but other products (automobiles, auto parts, textiles, etc.) are involved in the discussions, which make the process a drawnout affair. Further complicating this is the fact that the quota is for oranges and/or grapefruit. If these could be separated, it might be a simpler matter to get grapefruit liberalized.

Exports of lemons will continue to increase. They are well liked by the Japanese, who demand good quality. Lemons are found in every retail food outlet in the major cities, from small corner fruit stands to exclusive department stores, and at reasonable prices.

Oranges have been discussed previously, and while there could be an increased market for navels, the Japanese are reluctant to liberalize oranges because of the local industry pressures.

Limes were liberalized recently, but they are unknown in Japan although most of the large supermarkets and department stores do carry a few, primarily for foreigners residing in Japan. The United States is a net importer of limes, so it would appear that they do not present any particular export opportunities.

Deciduous fruits

Prospects for U.S. deciduous fruit exports can be summed up quickly. As mentioned previously, Japan has an adequate deciduous fruit industry. While fruit farms are generally small, cooperative handling has brought in mechanization, so the quality of the pack is good. Apple acreage has tended to become stabilized after a period of growth in the late 1950's and early 1960's. Nonbearing acreage has begun to show a decrease in the last 5 or 6 years.

Imports of all deciduous fruit from the United States are prohibited because of coddling moth. The Japanese will not consider lifting this restriction because of their large domestic fruit industry unless a fumigation procedure can be developed that will guarantee that the treatment is 100 percent effective. Because of the technical and scientific consideration involved, this may not be possible in the near future although vigorous research is underway.

Grapes

The prospect for exports of grapes has many ramifications. Japan does grow grapes, and its season coincides largely with the bulk of California's crop. After the main crops have been marketed, hothouse grapes come on the market. They are packed fancily in wooden boxes and sell at high prices. Prices per box vary, depending upon the weight of the bunch packed, but the grapes retail for about $2.00 a pound. Some Japanese importers have brought in U.S. grapes, but quality and condition varied from very good to excessively damaged. Most importing firms are not enthusiastic about imports of fresh table grapes because of their experiences with damaged fruit.

The new container service may provide the answers to the condition problems for grapes. With the faster service, improvements in refrigeration and atmosphere treatments, and the reduction in physical handling over conventional shipping, it may be possible to deliver grapes in good condition. Prices received for grapes in Japan during certain periods are usually at levels which would make test shipments by U.S. exporters profitable. Also, some losses from grapes going out of condition enroute could be sustained pricewise if damage could be held low.

Imports would have to be timed properly (late fall) and be of such quality and condition that they could survive the long voyage with a minimum of damage from the handling conditions outlined earlier. The Emperor and Rebier varieties would probably be the most feasible under the conditions described.

Speciality fruits

There are limited markets in Japan for other fruits that would be considered in the luxury or gift class. Papayas, avocados, and pineapples are examples. These all have to be airfreighted and are limited to stores catering to wealthy Japanese or foreigners. Papayas and avocados have been mentioned previously. Pineapple is well liked, and some Hawaiian pineapple is imported, but competition from the Philippines and Taiwan has taken over most of this market. Hawaiian pineapples, depending upon size, retail for about $1.50 to $2.00 each; but Taiwanese and Philippine pineapples sell for $1.00 each.

Japan is a good market for U.S.-grown almonds ($2.2 million in 1968), which are sold to confectioners and institutional outlets as well as at retail. Small quantities of macadamia, peanuts, and mixed nuts are imported and are usually limited to luxury food shelves.

Melons

Melons are in the gift class in Japan during most of the year. During the summer months, local melons are available at reasonable prices, but beginning in early fall melon production is from hothouses, and prices range from $4.00 to $8.00 per melon. The Japanese melon is called a muskmelon and is the size of the smaller U.S. cantaloup, with flesh similar in looks and taste to the honeydew melon.

Some importers have experimented with imports of U.S.-grown melons, but they have not been too successful. If the melons are picked mature enough to have flavor, damage in transit is excessive. When they are picked green so as to hold up during transit, they do not have the flavor preferred by the Japanese. If the new container ships can cut time and if the atmosphere treatments can improve carrying quality, cantaloups, honeydews, and other melons (except watermelons) could have possibilities in Japan. Most Japanese importers who know U.S. watermelons agree that they have little or no potential in Japan because of their size and flavor.

Vegetables

The Japanese are fresh-vegetable consumers. Vegetables are eaten cooked, raw, and in soups. Japan, however, is a vegetable-producing country and is largely self-sufficient in production. The United States does export some onions to Japan, but Taiwan has increased its production of onions (with U.S. varieties and techniques begun under Agency for International Development direction) and has the bulk of Japanese import market even though quality is often poor and the onions are of small sizes. While U.S. onions are well liked by the trade, their quantities are limited because of their high prices.

Imports of U.S. potatoes and sweetpotatoes are prohibited by plant-quarantine regulations. However, Japan is self-sufficient in production of these vegetables.

In its long-range forecast for 1977 the Japanese Government does not expect to import vegetables, except for a few items. At this time there are little or no possibilities for exporting fresh vegetables, and unless conditions change the future looks as bleak.

PROSPECTS FOR PROCESSED FRUITS AND VEGETABLES

As pointed out previously, Japanese consumers favor fresh fruits and vegetables. However, as their rapidly expanding economy develops further and more women work outside the home, demand for processed foods will increase. This trend will be slow over the next few years.

Canned fruits and vegetables

Japan is currently an exporter of canned fruit—mandarin oranges, peaches, apples, pears, and fruit salad. Prospects for U.S. canned fruits are limited because of the ability of the Japanese industry to produce as demand increases and the Japanese preferences for local varieties—white peaches, for example.

The outlook for canned vegetables is even less promising. There are local canneries (some with U.S. affiliation), and while they are small to medium in size compared to U.S. canneries, they are keeping abreast of the demand as it grows. Some U.S. interests are of the opinion that tomatoes and tomato products may have possibilities in Japan. The Japanese, however, are canning these products, and most Japanese believe the home-grown product is superior not only to the imported tomatoes but also to the local tomatoes packed under the U.S. brand name. This is indicative of the thinking now prevailing, particularly among the trade. In addition, the locally produced products are less expensive, and they are protected by restrictions on imports of tomato puree, paste, juice, sauce, and ketchup.

Frozen foods

Some frozen vegetables are imported from the United States, but demand is limited because of many of the same prejudices affecting canned foods. Local production is low, and 80 percent goes for the school lunch program and institutional uses. Corn-on-the-cob, lima beans, and peas are the principal commodities frozen. Some frozen foods are being imported from New Zealand and Australia. Growth of the frozen-fish industry in Japan is an example of a trend which may extend to frozen vegetables. The Japanese have always preferred fresh fish, and the frozen industry got off to a slow start. However, it is now growing at a rapid rate as the consumer becomes educated to the convenience and quality of the frozen product. It nevertheless still accounts for only a small percentage of the total fish used.

Coupled with the preference for fresh foods is the lack of facilities for frozen foods. The number of home refrigerators is growing, but they are small and have very limited frozen-food storage compartments. As in Europe, the Japanese housewife usually shops daily and in small neighborhood shops.

In addition to the lack of home refrigeration, frozen-food cabinet space in retail stores is very limited. This space is on the increase, and the larger supermarkets and department stores are expanding their frozen cabinet space. However, in the small neighborhood shops where so much of the Japanese shopping is done, this limitation is severe and in some cases nonexistent. The frozen-food industry in Japan is in its infancy, and it will be some time before production, demand, and facilities develop to the extent that volume sales are a reality.

Frozen concentrated citrus juices were considered a possibility during the course of the survey. They may have some potential in the future but have little in the short term. As one importer advised, "Your survey is just a few years too early." In addition to the factors mentioned above, the Japanese are not great juice users. They consume soft drinks but do not use fruit juices in the same manner as U.S. consumers. When conditions do change, the United States should be in a good competitive position to supply the market since Japanese citrus is not ideally suited to juice production although some hot-pack local juice is being canned. The only U.S. frozen concentrated orange juice observed in the numerous retail outlets visited was in a Yokohama supermarket that catered to the U.S. trade in that area.

The citrus industries in both California and Florida have been working with soft-drink manufacturers in Japan to supply concentrates for soft-drink bases. There are many factors involved in the expansion of the Japanese soft-drink industry, but this outlet for citrus products could grow in importance in the future.

Dried fruits

Japan is the leading overseas market for U.S. raisins. Since liberalization in 1961, exports have climbed spectacularly. Exports in 1960 were less than 1,000 tons and are now almost 18,000 tons.

Initial promotional efforts were directed toward institutional users of raisins. When this outlet became firmly established, promotional activities were concentrated on the consumer market. At the present time, the consumer market accounts for about one-third of Japan's total consumption.

The U.S. prune industry is engaged in promotional activities designed to expand exports to Japan. While the industry recognizes the trade limitations resulting from the sorbate restrictions mentioned earlier, promotional activities have been directed to institutional and consumer users. Because prunes have not enjoyed the success of raisins, particularly in the institutional field, promotional activities are now being directed toward consumers. The prune export market should grow, but such growth may not be as sharp as for raisins or as great in total volume.

LONG-TERM OUTLOOK

The market for imported fruits and vegetables in Japan is difficult to develop because of local production, the complex marketing system, stringent import controls, and competition from nearby producing areas. Under these circumstances the U.S. horticultural industries are doing a creditable job with those commodities that are not produced in Japan and have been liberalized.

The outlook for Japan as a market for U.S. fruits and vegetables may appear on the surface to be good because of the country's large population, thriving economy, and current position as the No. 1 overseas outlet for U.S. agricultural products. The success of lemons and raisins and other U.S. commodities such as wheat and feedgrains lends strength to this opinion. When the situation is studied in detail, however, even the selected commodities that do have potential, such as grapefruit, cannot be exported in any volume until changes are made in import controls.

This survey attempted to determine what commodities the Japanese do not produce, those that the United States could export competitively, and those that could utilize the improved transportation facilities that are scheduled for future operation. As pointed out, U.S. growers and shippers will have to be selective in choosing commodities to export. Volume exports, especially of grapefruit and possibly of prunes and melons, to Japan may be possible if tariff barriers and other restrictive measures are relaxed.

For the limited items with export potential, much will depend upon whether freight rates for both air and container movements can be lowered as the shipping-time requirement decreases and as more shipping capacity becomes available. Improved equipment could also be a factor in reducing damage and deterioration in transit, thereby allowing highly perishable commodities to be exported.

JAPAN: – Imports of selected fruits and vegetables in 1968

Item	Total imports		From United States	
	Quantity	Value	Quantity	Value
	Kilograms[1]	*1,000 yen*[2]	*Kilograms*[1]	*1,000 yen*[2]
Oranges	1,920,082	297,758	1,920,082	297,758
Lemons and limes	35,930,400	5,459,416	35,930,400	5,459,416
Grapefruit	1,213,226	154,642	1,213,226	154,642
Bananas	637,792,728	36,381,739	–	–
Grapes	3,656	409	3,656	409
Strawberries	4,049	3,220	4,049	3,220
Pineapple	21,382,442	1,201,842	854,647	72,219
Raisins	18,210,610	2,355,761	16,485,874	2,161,398
Prunes	902,473	135,358	771,849	118,956
Onions	28,859,880	1,292,250	3,407,698	207,365
Vegetables, frozen	1,087,820	124,875	121,373	29,314
Walnuts	486,080	135,898	–	–
Almonds	3,830,020	2,294,003	3,674,510	2,201,130
Orange juice, unsweetened	[3] 212,087	27,100	[3] 207,848	25,943
Canned peaches	654,065	81,172	561,134	71,159
Fruit cocktail	686,914	121,572	682,872	120,807
Canned pineapple	51,123,223	6,609,678	129,530	16,874
Grand total		56,676,693		10,940,610
Dollar equivalent		157,435		30,390

[1] 1 kg. = 2.2 lb.
[2] 360 yen = US$1.00.
[3] Liter.

JAPAN: – Fruit production

	1966	1967	1968[1]
	1,000 metric tons	*1,000 metric tons*	*1,000 metric tons*
Apples	1,059	1,125	1,130
Pears	404	447	455
Grapes	230	264	270
Peaches	264	285	308
Cherries	7	9	9
Persimmons	419	504	460

[1] Preliminary

JAPAN: – Satsuma oranges, planted area and production

Year	Bearing	Nonbearing	Total	Production
	Hectares	*Hectares*	*Hectares*	*Metric tons*
1965	63,300	51,900	115,200	1,331,000
1966	69,200	57,600	126,800	1,750,000
1967	75,700	63,600	139,300	1,605,000
1968[1]	85,000	70,000	155,000	2,250,000

[1] Preliminary

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